

## INSTRUCTIONS FOR ENTERING RATINGS AND PERFORMANCE PLANS IN EmpowHR (9/2006)

### 2006 SUMMARY RATING:

#### Supervisor will:

- Navigate through [Manager Self Service](#)>[Tasks](#)>[Performance](#)>[Summary Rating](#)
- Click [New Rating](#);
- Enter a plan start date or click the magnifying glass to select the applicable plan
- Click [Add](#);
- Click the [Elements and Standards](#) tab;
- Click the [View All](#) link to display each element;
- Click the magnifying glass to display the element rating model or enter the applicable numerical value (**6** Exceeds Fully Successful, **7** Meets Fully Successful **8** Does not Meet);
- Enter a summary rating for each element;
- Click the [Summary Rating](#) tab. The system will automatically calculate the Overall Summary Rating and enter the corresponding number in the summary rating box on the first page.
- Enter comments; if more space is needed, click [MORE COMMENTS](#)  
**Note:** documentation must be entered in EmpowHR for any element rated as “Exceed Fully Successful” or “Does Not Meet Fully Successful”. If there is not sufficient space, enter “See Attached” in the Comments and prepare a separate document with the comments. Since this will not be included in the electronic process, the supervisor and employee will need to date and sign the document. The employee should be given a copy and the supervisor should retain the original. A copy will also need to be mailed to Martha Newsom as she will be printing copies of the Performance Plans and Ratings for inclusion in the Performance folder of the OPFs.
- **Save** summary rating.

#### Reviewer will:

- Click the [Worklist](#) link and select the appropriate performance action; **or**
- Navigate through [Manager Self Service](#)>[Tasks](#)>[Performance Reviewer](#) for a list of subordinate supervisors;
- Click the box next to the appropriate supervisor and a list of their employees will display;
- If a rating has been entered a box for the date will be displayed;
- Enter the plan start date or click the magnifying glass to select the applicable date;
- Click the box next to the applicable employee and their summary rating will display;
- If necessary add comments or modify the summary rating;

- Click [Concurred with Rating](#) in the Reviewer box;
- **Save** summary rating.

**NOTE:** The rating will not be sent to NFC until after the Reviewer concurs.

**Employees will:**

- Click the [Worklist](#) link **or** navigate through [Employee Self Service>Tasks>Summary Rating](#);
- Click the applicable Plan date;
- Click the [Elements and Standard](#) tab;
- Click the [View All](#) link to review the element rating;
- Click the [Performance Plan](#) Tab;
- Enter comments;
- Click the [Viewed/Discussed](#) or [Refused Rating](#) box. Note that an employee's checking of the [Viewed/Discussed](#) box does not signify agreement with the rating, only that the rating was received by the employee.
- **Save** summary rating.

## **2007 PERFORMANCE PLAN**

**Supervisor will:**

- Navigate through [Manager Self Service>Tasks>Performance](#);
- Click [Performance Plan](#) and a list of employees will display;
- Click [New Plan](#);
- Enter a start date;
- Enter the [Rating Scale](#) ([H] 5 Tier or click the magnifying glass to display a list of the rating scale definitions;
- Click the [Elements and Standard](#) Tab;
- Click the [plus \(+\) button](#) to add each Element and Standard individually;
- Click the [View All](#) link to display each element;
- Click the magnifying glass to display a list of elements or enter the element number. [Supervisors should use only the elements provided by the Area Director or State Office.](#) Additional elements should not be added. The language in the standards being provided differs from the language in the generic standards in EmpowHR. Supervisors should [delete the generic language and paste in the language being provided.](#)
- Select a [Critical Indicator](#) (Critical or Non-Critical). At least one MUST be non-critical;
- **Save** the performance plan and the current date will automatically display in the Supervisor's box on the performance plan page.
- If necessary, click the "Return to Employee List" to enter additional plans.

**Employees will:**

- Click the [Worklist](#) link **or** navigate through [Employee Self Service>Tasks>Performance](#) and select [Existing Plan](#);

- If necessary, click the applicable plan date;
- Click the [Elements and Standard](#) tab;
- Click the [View All](#) link to display each element;
- Click the [Performance Plan](#) tab;
- Click the [Viewed/Discussed](#) **or** [Refused to Sign](#) box. Note that an employee's checking of the [Viewed/Discussed](#) box does not signify agreement with the plan, only that the plan was discussed/received by the employee.
- **Save** performance plan.

**Reviewer will:**

- Click the [Worklist](#) link and select the appropriate performance action; **or**
- Navigate through [Manager Self Service](#)>[Tasks](#)>[Performance Reviewer](#) for a list of subordinate supervisors;
- Click the box next to the appropriate supervisor and a list of their employees will display;
- If a plan has been entered, a box for the plan start date will be displayed next to the employee;
- Enter the plan start date or click the magnifying glass to select the applicable date;
- Click the box under the Select to Edit column and the plan will display;
- Click [Concurred](#) in the Reviewer box;
- **Save** performance plan.

**NOTE:** Since the 5 tier performance management system requires concurrence of the Reviewer; the supervisor will no longer be required to finalize the plan in EmpowHR; it will be done by the Reviewer.